

FieldManager Contractor Read-Only Copies of Construction Contracts

How to request, install and configure to receive FieldManager read-only contracts

Updated May 24, 2018

Prime contractors and subcontractors may request to receive FieldManager Contractor Read-Only copies of construction contracts they are working on. This procedure applies to all WisDOT construction contracts, whether managed by the WisDOT or consultants. It is recommended that contractors submit a request for this at the preconstruction conference. Managing offices (office administering the contract) should use the FieldManager's read-only distribution function, which will automatically send Contractor Read-Only copies whenever Construction Pay Estimate Reports are generated. On rare occasions, contractors may also request an additional Contractor Read-Only copy during a time frame that is outside of the normal Construction Pay Estimate Report process. These Contractor Read-Only copies can be sent upon mutual agreement with the managing office.

This process encourages managing offices and contractors to take advantage of these benefits:

1. Improved communication between managing offices and contractors
2. Reduced volume of telephone calls, mailings, and faxes
3. Reduced time required to gather information for contractors
4. Reduced volume of questions from contractors
5. More accurate and timely information from contractors
6. Earlier identification of errors and concerns
7. More efficient discussions concerning item status reviews
8. More efficient review of contract modifications
9. Timelier responses from project staff during the busy construction season
10. Improved quality and timeliness of IDRs
11. Improved contract finalization process
12. Elimination of some contractor spreadsheets and hand-generated data
13. Elimination of difficulties related to viewing information received due to poor quality faxes
14. Improved managing office/contractor relationships

How to request and install FieldManager for use at WisDOT:

1. Contractors must obtain a FieldManager license to receive Contractor Read-Only copies. Two different applications are available depending upon the needs of the contractor.
 - a. FieldManager Read-Only application – This application is used to view the data associated with the construction contract.
 - b. FieldManager Contractor application – This application allows the contractor to manage the data, create discrepancy reports, establish subcontracts, etc.
 - c. Both options are available for licensing directly from https://www.infotechfl.com/field_manager.
2. Install FieldManager following the directions in the *FieldManager Installation and Conversion Guide*, Section 2. Installing a Stand-Alone FieldManager Module.
3. Complete these steps when creating the local FieldManager databases following the FieldManager datasource (database) wizard:
 - a. On the first Add Fieldmanager datasource window, leave the default set as "Standalone datasource (local)" and select <Next>
 - b. On the second Add Fieldmanager datasource window, create a NEW datasource by enter the appropriate datasource name based on the region the contract you are administering is in:

NWfieldmgr	Northwest region	NCfieldmgr	North Central region
NEfieldmgr	Northeast region	SWfieldmgr	Southwest region
SEfieldmgr	Southeast region		

Select <Finish> when the data entry is complete.

How to configure FieldManager for use at WisDOT

1. To configure FieldManager, the contractor will be required to request:
 - a. FieldNet ID - FieldNet is a webservice administered by WisDOT to manage the transfer of contract information between the FieldManager client and the AASHTOWare Project

Construction Administration System. The FieldNet user id is the mechanism used to transfer data between the client and the FieldNet server. A separate FieldNet user id is required for each FieldManager database for the licensed FieldManager installation.

- b. Agency Configuration Program (.ACP) file which contains FieldManager settings specific to WisDOT)
 - c. Request both the FieldNet ID and the .ACP file from Annette Czerneski at 715-421-7319 or email annette.czerneski@dot.wi.gov or Adam Bleskacek at 715-833-5574 or email adam.bleskacek@dot.wi.gov . Provide the following information with the request:
 - Contractor name
 - Contractor's WisDOT Vendor id
 - Contact name
 - Contact phone number
 - Date of purchase of FieldManager license
2. Import ACP file
 - a. Log into the FieldManager database as the system administrator.
 - b. When prompted for the Agency Configuration Program file, browse to the location of the file received from WisDOT and click <Open>.
 - c. <OK> when prompted that "The ACP file has been loaded successfully."
 3. Configure FieldNet ID
 - a. Utilities | System Management | System Configuration
 - b. General tab
 - i. Enter the Region designation
All capital letters to match the datasource name.
Examples – NC for NCFieldMgr, SW for SWFieldMgr, etc
 - c. FieldNet tab
 - i. Enter the FieldNet ID
 - ii. Enter the FieldNet ID password twice
 - iii. Select <Activate Account>
 - d. <OK>
 - e. <OK>
 4. Add a local FieldManager logon account
 - a. Utilities | System Management | Maintain Users
 - i. <Add>
 - ii. Complete the following fields to add a user with System Administrator authority:
 - User ID
 - Uesr Name (last and first)
 - Password
 - Re-enter Password
 - Security Level: System Administrator
 5. Test communication with FieldNet Server and the AASHTOWare Construction Administration System.
 - a. Utilities | FieldNet | Request reference files from FieldNet
 - b. Utilities | FieldNet | Request FieldNet ID from FieldNet
 - c. <Send Outbox>
 - d. Wait a few minutes. <Get mail>
 - e. Double click on each item in the mailbox to process them.
 6. Repeat steps 2-5 if you have multiple databases.

How to configure FieldManager on the Managing Office Project Engineer computer

Project Engineers can refer to page 8 of the Field Software User's Guide for Construction Staff for the instructions to set up the automatic read only contract copy distribution at estimate generation process.

Type of FieldManager contract information excluded (not available) to the contractor

<input checked="" type="checkbox"/> Use Contractor Readonly	<input checked="" type="checkbox"/> Exclude Attachments
Remark/Comment Field Exclusions (check to exclude data from contractors)	
<input checked="" type="checkbox"/> Docu: Site Events: Remarks	<input checked="" type="checkbox"/> Items: Material: Remarks & Materials: Item: Remarks
<input type="checkbox"/> Docu: General: Managing Office Comments	<input checked="" type="checkbox"/> Items: Breakdowns: Breakdown Item Comments
<input checked="" type="checkbox"/> IDRs: General: Comments	<input checked="" type="checkbox"/> Materials: Approvals: Remarks
<input type="checkbox"/> IDRs: Site Times: Comments	<input type="checkbox"/> Estimates: General: Estimate Comments
<input type="checkbox"/> IDRs: Postings: Item Posting Remarks	<input type="checkbox"/> Stockpiles: Step 1: Comments
<input checked="" type="checkbox"/> IDRs: Postings: Material Usage Remarks	<input type="checkbox"/> Stockpiles: Step 2: Transaction Comments
<input checked="" type="checkbox"/> Diaries: General: Comments	<input type="checkbox"/> Misc Rpts: Weekly Report...: General :Remarks
<input type="checkbox"/> Diaries: Site Times: Comments	<input checked="" type="checkbox"/> Misc Rpts: Notice of Change...: Ratings: Remarks
<input checked="" type="checkbox"/> Items: Documentation: Documentation	
<input checked="" type="checkbox"/> Items: Documentation: Notes	
Miscellaneous Report Exclusions (check to exclude reports from contractors)	
<input checked="" type="checkbox"/> Misc Rpts: Contractor's Performance	<input type="checkbox"/> Misc Rpts: Weekly Report of Time Charges
<input checked="" type="checkbox"/> Misc Rpts: Contractor's Performance Evaluation	<input checked="" type="checkbox"/> Misc Rpts: Notice of Change in Const. Status
<input checked="" type="checkbox"/> Misc Rpts: FieldBook Import Report	

Important notes:

- Occasionally, a Pay Estimate Report may not be approved for payment and must be revised and regenerated by the Managing office. A revised Pay Estimate Report will be sent with a new Read-Only copy. All Pay Estimate Report information is considered as an estimate of payment until such time as the approved payment voucher is processed. A copy of the payment voucher is mailed to the prime contractor with their payment.
- Contractors must keep their release of FieldManager current to continue receiving Contractor Read-Only copies. All license types include delivery of new FieldManager releases issued during the license period.

If you have any questions regarding Contractor Read-Only FieldManager contracts, please contact Annette Czerneski at 715-421-7319, Adam Bleskacek at 715-833-5574 or David Castleberg at 608-264-7606.